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## Canada

## Fishery Products

## Annual

## 2003

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**Report Highlights:**

Canada is the second most important market for U.S. exports of fish and seafood. U.S. exports to Canada during 2002 accounted for one-fifth of total U.S. exports in the sector.

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Includes PSD Changes: Yes  
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## Executive Summary

- \* Canadian commercial landings of groundfish were lower for cod, haddock, redfish, flatfishes, turbot and hake during 2002 while pelagic species, mostly mackerel and salmon registered significant increases. The Canadian shellfish harvest continues to expand with scallop, shrimp and crab leading the way.
- \* For 2001, the latest year recorded, Canadian aquaculture production accounted for an estimated 40.5% of total Canadian fish product production as reported by Statistics Canada.
- \* Canada is the second most important market for exports of U.S. seafood, after Japan. During 2002, U.S. fish and seafood exports to Canada totaled \$576 million and accounted for almost one-fifth of total U.S. exports in the sector.
- \* For 2003, the value of U.S. exports of seafood to Canada is forecast to decline reflecting reduced demand caused by an economic slowdown in the Canadian foodservice and tourism industries related to Sudden Acute Respiratory Syndrome (SARS), Bovine Spongiform Encephalopathy (BSE), and a widespread power blackout in Ontario.
- \* Canadian exports of fish and seafood advanced sharply during 2002 to 544,212 metric tons, nearly a 14% increase over the 2001 level. Most of the increase was attributable to increased exports of frozen crab and shrimp to China and Japan.
- \* Canadian fish and seafood exporters are eligible for the first time for funding under the Canadian Agriculture and Food International (CAFI) Program which is designed to provide federal assistance for trade promotion activities. The fish and seafood share of the promotional funding is estimated at about C\$1.0 million.

**Section I. Production**

Canadian commercial landings of groundfish were lower for major species such as cod, haddock, redfish, flatfishes, turbot and hake during 2002 while pelagic species, mostly mackerel and salmon registered significant increases. The Canadian shellfish harvest continued to expand with scallop, shrimp and crab leading the way. For 2003, post forecasts a moderate increase in total catch as shown below.

**Canada: Fish & Shellfish Commercial Catch**

(includes aquaculture)

Landings in Metric Tons Live Weight

SPECIES	2001 Revised	2002 Prelim.	2003 Post Est.	2004 Post Fore.
Groundfish	273,639	252,924	230,000	220,000
Pelagic & Other Finfish	305,208	321,779	340,000	350,000
Shellfish	447,427	463,446	480,000	490,000
SUBTOTAL	1,026,274	1,038,149	1,050,000	1,060,000
Other:				
Marine Plants, Roe, etc.	37,641	17,726	25,000	20,000
FISHERY TOTAL	1,063,915	1,055,875	1,075,000	1,080,000

Source: DFO & Post

## Landings By Species

**2002 ATLANTIC & PACIFIC COASTS COMMERCIAL LANDINGS, BY PROVINCE**  
(metric tonnes, live weight)

	Nova Scotia	New Brunswick	PEI	Quebec	Nfld.	Total Atlantic	British Columbia	Total Canada
<b>Groundfish</b>								
Cod	8,987	1,396	513	3,279	21,079	35,254	694	35,948
Haddock	14,630	19	0	0	299	14,947	0	14,947
Redfish spp.	9,464	15	0	347	6,918	16,745	22,145	38,890
Halibut	964	42	8	186	448	1,649	6,487	8,136
Flatfishes	5,724	96	393	686	14,223	21,122	6,733	27,855
Greenland turbot	505	25	0	1,052	9,655	11,237	5,167	16,404
Pollock	7,067	59	0	0	491	7,617	3,606	11,223
Hake	17,097	45	11	16	1,255	18,425	56,872	75,297
Cusk	1,286	1	0	0	1	1,288	0	1,288
Catfish	177	0	0	22	523	723	0	723
Skate	474	0	0	6	2,488	2,969	1,540	4,509
Dogfish	3,267	173	0	26	123	3,589	4,701	8,290
Other	2,612	44	3	7	2,604	5,270	4,144	9,414
<b>Total</b>	<b>72,255</b>	<b>1,916</b>	<b>929</b>	<b>5,628</b>	<b>60,107</b>	<b>140,835</b>	<b>112,089</b>	<b>252,924</b>
<b>Pelagic &amp; other finfish</b>								
Herring	81,977	68,730	16,645	5,301	18,444	191,097	29,321	220,418
Mackerel	13,208	1,603	5,914	4,385	17,982	43,092	0	43,092
Swordfish	910	0	0	0	49	959	0	959
Tuna	714	2	0	0	146	862	3,495	4,357
Alewife	450	4,464	82	0	0	4,995	0	4,995
Eel	4	111	63	0	52	231	0	231
Salmon	0	0	0	0	0	0	33,099	33,099
Smelt	5	243	60	0	6	314	0	314
Capelin	0	0	0	77	13,482	13,559	0	13,559
Other	392	9	144	2	39	586	169	755
<b>Total</b>	<b>97,660</b>	<b>75,161</b>	<b>22,908</b>	<b>9,765</b>	<b>50,200</b>	<b>255,695</b>	<b>66,084</b>	<b>321,779</b>
<b>Shellfish</b>								
Clams/quahaugs	8,923	547	1,064	2,632	15,568	28,734	3,077	31,811
Oyster 1/	91	183	2,137	0	0	2,410	0	2,410
Scallop 2/	90,550	2,115	10	1,248	1,038	94,960	42	95,002
Squid	25	0	0	0	228	253	0	253
Mussel 3/	86	111	13,510	62	0	13,769	0	13,769
Lobster	23,988	7,401	8,628	3,118	1,976	45,111	0	45,111
Shrimp	29,247	6,679	0	16,550	82,962	135,439	3,622	139,061
Crab, Queen	15,309	11,948	2,267	17,820	59,422	106,766	0	106,766
Crab, Other	3,015	3,218	2,783	1,980	1,207	12,202	4,090	16,292
Sea urchin	259	1,187	0	42	807	2,295	4,146	6,441
Other	2,232	819	0	1,748	590	5,389	1,141	6,530
<b>Total</b>	<b>173,724</b>	<b>34,208</b>	<b>30,398</b>	<b>45,200</b>	<b>163,799</b>	<b>447,328</b>	<b>16,118</b>	<b>463,446</b>
<b>Seafish/Shellfish</b>	<b>343,639</b>	<b>111,285</b>	<b>54,235</b>	<b>60,593</b>	<b>274,107</b>	<b>843,859</b>	<b>194,291</b>	<b>1,038,150</b>
Marine plants	15	10,940	5,796	0	0	16,751	0	16,751
Lumpfish roe	0	0	0	3	177	180	0	180
Miscellaneous	0	0	0	0	652	652	143	795
<b>Total</b>	<b>15</b>	<b>10,940</b>	<b>5,796</b>	<b>3</b>	<b>829</b>	<b>17,583</b>	<b>143</b>	<b>17,726</b>
<b>GRAND TOTAL 4/</b>	<b>343,654</b>	<b>122,225</b>	<b>60,031</b>	<b>60,595</b>	<b>274,936</b>	<b>861,442</b>	<b>194,434</b>	<b>1,055,876</b>

1/ Oyster: BC data now reported under Aquaculture. Atlantic includes wild and farmed data.

2/ Scallop includes meat with roe.

3/ Mussel: includes wild & farmed.

4/ Totals may not add up due to rounding.

Source: DFO

## Section II. Fish Product Production

Statistics Canada reports fishery product production on an annual basis. The recently published data are shown below together with post estimates and projections.

### Canada: Fish Product Production, By Type

Units: metric tons

	2000	2001	2002 estimate	2003 forecast
Seafish				
-Fresh & Frozen	160,460	191,940	200,000	210,000
-Processed	68,770	82,260	87,000	90,000
Shellfish	81,340	84,560	90,000	95,000
Freshwater Fish	20,420	17,660	19,500	20,000
TOTALS	330,990	376,420	396,500	415,000

Source: Statistics Canada & Post Estimates

### Section III. Aquaculture Production

Statistics Canada reports that the industry reported operating revenues of C\$704.5 million in 2001, down from C\$722.9 million the previous year. Sales of products and services totaled C\$675.2 million, a 2.5% decline. Of that, finfish, mostly salmon, accounted for \$602.0 million, or almost 90% of total sales. In 2001, aquaculture production accounted for an estimated 40.5% of total Canadian fish product production as reported by Statistics Canada.

Despite an increase in production and a jump in exports, finfish sales fell 4.4% in 2001. Significantly lower prices for farmed salmon, due mainly to larger supplies in the United States, had a major impact on revenues. On the other hand, sales of mollusks reached C\$65.2 million, representing 9.7% of total sales in 2001, compared to 8.0% in 2000. Prince Edward Island fish farmers generated C\$28.2 million in mollusk sales in 2001, over 40% of the national total.

British Columbia remained Canada's largest aquaculture producing province, with sales of C\$293.4 million. Farmers there accounted for 43% of the country's total aquaculture sales. An increase in finfish production was offset by falling prices of farmed salmon. As a result, total sales of finfish in 2001 declined 2.8%, while sales of mollusks totaled C\$18 million, up 38% from 2000.

#### Canada: Aquaculture Production

Units: metric tons

	2000	2001	Post Forecast 2002
<b>Finfish</b>			
Salmon	82,195	105,306	
Trout	6,407	6,516	
Steelhead	5,523	4,705	
Other	694	1,558	
Subtotal	94,895	118,161	135,000
<b>Shellfish</b>			
Clams	1,000	1,400	
Oysters	9,624	10,713	
Mussels	21,287	21,666	
Scallops	69	128	
Other	359	455	
Subtotal	32,339	34,362	35,000
<b>Total</b>	127,234	152,523	175,000

Note: totals include data deemed confidential by Statistics Canada in the provincial breakdown of the data.

Source: DFO

New Brunswick sales, which reached C\$279.1 million in 2001, also fell as a result of lower prices. British Columbia and New Brunswick accounted for 84% of aquaculture revenues last year. Nationally, product expenses (the cost of products and services purchased from other businesses excluding capital and labor costs) totaled C\$466.4 million in 2001, down 1.7% from 2000. Feed costs, which accounted for over 40% of all product expenses for finfish producers, increased slightly to C\$191.8 million.

During the past decade, the export market for Canadian aquaculture has increased consistently, driven in large part by demand for salmon in the United States. In 2001, the value of aquaculture exports, which totaled C\$444.3 million, increased 17% from the previous year, more than triple 1992 levels.

## Section IV. Consumption

### Canada: Fish & Seafood Per Capita Consumption

Units: kilograms, edible weight

	1999	2000	2001
Seafish			
-Fresh & Frozen	4.81	4.50	4.57
-Processed	2.49	2.18	2.45
Shellfish	2.29	2.35	2.13
Freshwater Fish	0.42	0.46	0.42
TOTALS	10.01	9.49	9.57

Source: Statistics Canada



## Section V. Trade

## Total Fish and Seafood Imports

U.S. exports of fish and seafood to Canada maintained a steady share of the Canadian import market in the three years ending 2002. Along with other suppliers, U.S. sales during the first seven months of 2003 declined reflecting a general economic downturn in the first months of 2003 reflecting SARS, BSE, and a summer power blackout in Ontario.

## Canada: Fish &amp; Seafood Imports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	2002 Jan-July	2003 Jan-July	% chng
-- The World --	339,029	352,162	348,118	195,326	174,222	-11%
United States	147,473	156,223	149,549	78,349	72,401	-8%
Thailand	34,664	39,019	41,755	22,685	22,230	-2%
China	18,561	21,263	26,136	13,272	20,717	56%
Russia	17,335	15,962	20,601	14,156	10,344	-27%
Norway	17,375	20,293	18,801	10,212	8,183	-20%
Philippines	5,079	4,235	8,345	3,832	2,756	-28%
Iceland	13,633	8,687	7,207	4,714	1,566	-67%
Taiwan	9,295	6,557	6,978	3,645	3,586	-2%
Korea, South	1,995	2,942	6,201	5,599	808	-86%
Chile	3,806	4,461	5,703	3,456	4,449	29%
All Others	69,813	72,519	56,841	35,405	27,181	-23%
U.S. share	43%	44%	43%	40%	42%	
HS Codes:	0301.91 Live Trout			0304 Fish Fillets		
	0301.92 Live Eels			0305 Fish, dried, salted, etc		
	0301.93 Live Carp			0306 Crustaceans		
	0301.99 Live Fish, nes			0307 Molluscs, etc		
	0302 Fish, Fresh or chilled			1603 Fish, extracts, etc		
	0303 Fish, Frozen			1604 Fish, prepared or preserved		

Note: excludes ornamental fish

## Total Fish and Seafood Exports

Total Canadian exports of fish and seafood advanced sharply during 2002 to 544,212 metric tons, nearly a 14% increase over the 2001 level. Most of the increase was attributable to the significant increase in exports of frozen crab and shrimp to China and Japan. Other important volume increases were noted for fresh, whole salmon and halibut exports to the United States. As a result of the increase in exports to Asia, Canada's reliance on the United States for fish and seafood exports slipped to 61% of total in 2003 from 66% the previous year. For the first seven months of 2003, Canadian export increases for fish and seafood continued into the China market, but fell for the U.S. and Japanese markets.

### Canada: Fish & Seafood Exports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	2002 Jan-July	2003 Jan-July	% change 03/02
-- The World --	430,205	478,297	544,212	313,594	298,792	-5%
United States	292,641	314,211	334,642	199,174	190,088	-5%
Japan	44,257	39,705	54,152	31,841	24,188	-24%
China	13,703	17,527	34,666	18,923	20,811	10%
Denmark	11,276	12,669	14,370	9,473	10,450	10%
Korea, South	3,041	6,551	11,768	5,542	6,433	16%
Dominican Republic	7,324	10,626	11,094	8,367	4,552	-46%
United Kingdom	7,898	9,077	7,823	3,555	4,187	18%
Germany	7,045	12,209	7,406	4,030	5,070	26%
All Others	43,021	55,722	68,291	32,689	33,014	1%
% share to the U.S.	68%	66%	61%	64%	64%	

HS codes: 03; 1604; 1605

Source: Derived from World Trade Atlas

## Section VI. Policy

The dominant issues concerning Canada's fishing policy include Department of Fishery's and Ocean's (DFO) action plan to enable the responsible development of the aquaculture sector and to strengthen DFO's role as the lead federal agency for aquaculture; the DFO response to the *Marshall* decision dealing with aboriginal fishing rights and fishing agreements with First Nations. All DFO press releases and background information on the current issues accessed on the DFO webpage at: [http://www.dfo-mpo.gc.ca/home-accueil\\_e.htm](http://www.dfo-mpo.gc.ca/home-accueil_e.htm)

Canada is a member of the Northwest Atlantic Fisheries Organization (NAFO) which recently held its annual meeting. According to a DFO report, progress was made in key areas including the development of a long-term conservation and rebuilding plan for Greenland halibut (turbot), introduction of a pilot project on compliance and enhancements to NAFO's conservation and enforcement regime. As well, NAFO has agreed to examine issues related to the management and regulation of 30 Redfish. All NAFO parties agreed to a turbot conservation plan that includes an overall reduction of 60 per cent in the total allowable catch (TAC). There will be an immediate and significant reduction of TAC, with the 2004 quota being reduced to 20,000 MT, from 42,000 MT in 2003. The plan includes further annual reductions leading to a TAC of 16,000 MT in 2007. The DFO claimed it is pleased with this move away from a management regime focused on a single year TAC toward a comprehensive, long-term rebuilding strategy that includes vessel authorization, fishing effort reduction plans, vessel reporting requirements and enhanced monitoring and control of the fishery.

## Section VII. Export Promotion

The Canadian Agriculture and Food International (CAFI) Program

In March 2003, federal agriculture minister Lyle Vanclief announced that fish and seafood exporters will, for the first time, be eligible under the Canadian Agriculture and Food International (CAFI) Program which is designed to provide federal assistance for trade promotion activities (see CA3013). In April 2003, Vanclief promoted Canadian seafood on a Team Canada Trade Mission to China and in May 2003, Canadian seafood exporters participated in the European Seafood Exposition in Belgium. Twenty-four companies from seven provinces were represented in this year's Canadian Pavilion, the largest Canadian presence to date. The Pavilion featured the cooking and presentation skills of a Vancouver based chef. The (CAFI) is a new cost-shared contribution program designed to support Canadian agri-food industry activities in areas of branding and market development, trade advocacy and technical marketing. The objective of the CAFI program is to support industry action to deliver on a comprehensive national strategy to gain and expand international recognition and enhance market opportunities for Canadian agriculture and food products. The new C\$26 million program provides industry groups with matching funding for export marketing efforts. The fish and seafood share of the promotional funding is estimated at about C\$1.0 million.

Trade Commissioner Service

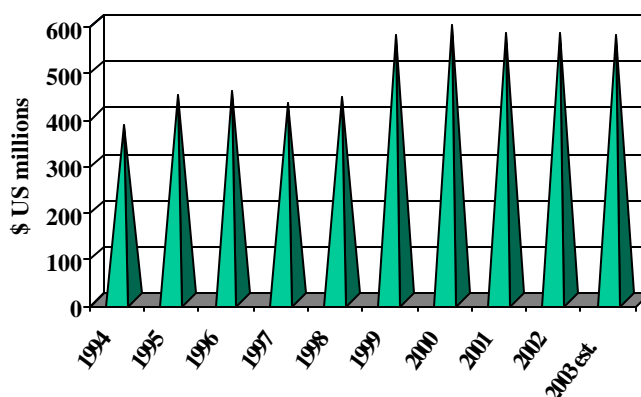
Canada's Trade Commissioner Service provides Canadian companies free access to its sectoral market studies and country-specific reports prepared by its Market Research Centre and by its offices abroad in Canadian Embassies and High Commissions. The reports are intended to assist Canadian companies identify foreign business opportunities and learn

more about target markets. The seafood sector reports are disseminated to Canadian companies only. For more information, go to: [www.infoexport.gc.ca](http://www.infoexport.gc.ca)

### Section VIII. Marketing

Canada is the second most important market for exports of U.S. seafood, after Japan. During 2002, U.S. fish and seafood exports to Canada totaled \$576 million and accounted for almost one-fifth of total U.S. exports in the sector. The chart below shows the 10 year performance of U.S. fish and seafood exports in the Canadian market. For 2003, the value of exports is forecast to dip reflecting reduced demand under an economic slowdown as the Canadian foodservice and tourism industry struggled with the adverse effects of Sudden Acute Respiratory Syndrome (SARS), Bovine Spongiform Encephalopathy (BSE), and a widespread power blackout.

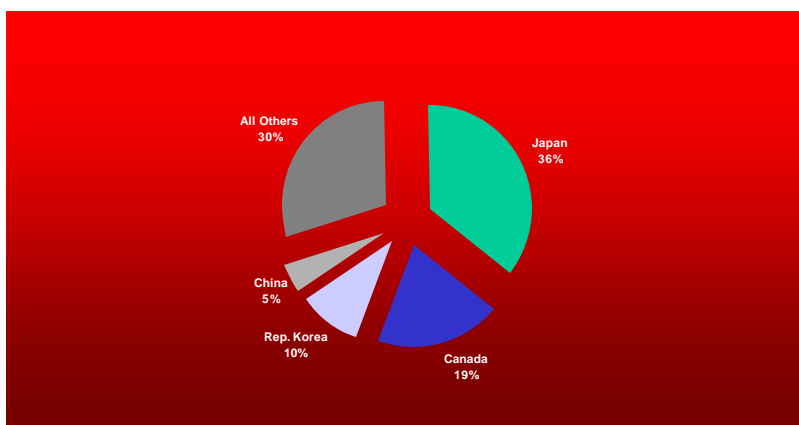
### U.S. Fish & Seafood Sales to Canada



### Share of Exports

The chart below illustrates the importance of the Canadian market to U.S. fish and seafood exporters. With sales to Canada of \$576 million in 2002, Canada was second in importance to Japan (\$1.1 billion), but accounted for more than double the sales to the Republic of Korea, the third most important destination.

## Major U.S. Seafood Markets 2002



### Summary of Regulatory Requirements

Fish and fish products are subject to the Fish Inspection Act and Regulations, which contain requirements for wholesomeness, labeling, packaging, grading, and health and safety. The Canadian importers of fish and fish products must have an Import Licence issued by the Canadian Food Inspection Agency and must notify the closest Canadian Food Inspection Agency fish inspection office in writing each time they import fish. Restrictions apply to the importation of live or raw bivalve molluscan shellfish such as mussels, clams and oysters. Import permits may be required for certain types of cultured fish. Certain provinces may have additional requirements for the importation of live fish.

Canadian regulatory requirements for imported fish and fish products are administered by the Canadian Food Inspection Agency's Fish Inspection Directorate (FID). Canadian importers are required to obtain an Import License issued by the FID prior to importing fish products. An import licence costs \$C500 per year and is valid for 12 months. Importers are required to notify the FID prior to importation of a product or within 48 hours following importation, stating the type and quantity, the name of the producer, the country of origin and the storage location for each product contained within a shipment. The following inspection service fees are charged for imported products: \$C50 per shipment of imported fresh fish; \$C30 per shipment for any fish imported for further processing; or \$C50 per lot for any other type of imported fish to a maximum of \$C250 per shipment.

The following information provides a guideline to some of the important Canadian packaging and labeling requirements for fish and seafood:

- Shipping containers for fresh or frozen fish must be stamped or stenciled on one end with all code markings that identify the packer, and day, month, and year of packing.
- For canned product, each can must be embossed, or otherwise permanently marked, in a code that identifies the name of the establishment, the day, month, and year of processing, and where required in the regulations, the species of fish. FID requires the Canadian importer to provide a list indicating the establishment and the number of containers for each production code.
- General labeling requirements for fish and fish products in consumer packages include, but are not limited to: English and French for mandatory information, list of ingredients, including additives, the name and address of the packer or distributor, the common name of the product, and the weight in metric units (imperial weight units may appear in addition). Technical questions on packaging and labeling should be directed to:

Fish Inspection Directorate  
Canadian Food Inspection Agency  
59 Camelot Drive  
Nepean, Ontario K1A 0Y9  
Telephone: (613) 225-2342

For detailed information concerning the CFIA's import inspection program go to:  
<http://www.inspection.gc.ca/english/anima/fispoi/fispoie.shtml>

## Section IX. Supply and Distribution Tables and Trade Matrices

## Groundfish

Country Commodity	Canada Groundfish, Whole/Eviscerated (MT)					
	2002 USDA Official (OLD)	Revised Post Est. [New] 01/2002	2003 USDA Official (OLD)	Estimate Post Est. [New] 01/2003	2004 USDA Official (OLD)	Forecast Post Est. [New] 01/2004
<b>Market Year Begin</b>						
Beginning Stocks	0	0	0	0	0	0
Total Production	68000	62000	0	65000	0	68000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	31500	29775	0	35000	0	37000
TOTAL Imports	31500	29775	0	35000	0	37000
TOTAL SUPPLY	99500	91775	0	100000	0	105000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	19500	23745	0	25000	0	26000
TOTAL Exports	19500	23745	0	25000	0	26000
Domestic Consumption	80000	68030	0	75000	0	79000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	80000	68030	0	75000	0	79000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	99500	91775	0	100000	0	105000

Trade Matrices: Groundfish

**Canadian Groundfish Imports**

2000-2003 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	26,873	26,979	29,775	18,558	23,384	26%
United States	11,302	11,515	14,384	8,877	9,139	3%
Russia	9,412	9,780	10,297	7,001	9,588	37%
Norway	3,194	2,057	3,520	1,606	3,378	110%
China	305	1,571	702	333	834	151%
Uruguay	1,393	1,305	212	212	7	-96%
Thailand	34	132	86	68	89	32%
Faroe Islands	-	108	81	50	61	22%
All Others	1,233	510	494	412	286	-30%

Source: Derived from World Trade Atlas

**HS Codes**

030360	COD EXCEPT FILLETS, LIVERS AND ROES, FROZEN
030372	HADDOCK EXCEPT FILLETS, LIVERS AND ROES, FROZEN
030250	COD EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED
030373	ATLANTIC POLLOCK EXCEPT FILLET, LIVER & ROE FROZEN
0302690010	Hake, fresh or chilled, excluding heading 03.04, I
030378	WHITING & HAKE, EXCEPT FILLETS, LIVER, ROE, FROZEN
030263	ATLANTIC POLLOCK EXCEPT FILLET, LIVER, ROE, FR, CH
030262	HADDOCK EXCEPT FILLETS, LIVER, ROE, FRESH, CHILLED



**Canadian Groundfish Exports**

2000-2003 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	19,505	19,997	23,745	13,225	14,706	11%
United States	18,400	18,567	17,935	9,829	9,866	0%
Korea, South	48	418	2,574	2,157	706	-67%
Spain	458	313	1,181	503	1,972	292%
China	-	19	888	249	564	127%
Japan	300	374	490	224	284	27%
United Kingdom	81	78	111	39	664	1612%
Denmark	11	-	110	110	-	-100%
All Others	207	229	456	115	650	464%

Source: Derived from World Trade Atlas

## HS Codes

03026200	Haddock, fresh or chilled
03026921	Hake, fresh or chilled
03036010	Cod Atlantic, frozen
03025010	Cod, Atlantic, fresh or chilled
03036090	Cod nes, frozen
03026300	Coalfish, fresh or chilled
03037915	Perch, ocean, frozen
03037800	Hake, frozen
03026911	Perch, ocean, fresh or chilled
03037912	Cusk and pollock, frozen
03037300	Coalfish, frozen
03037200	Haddock, frozen
03026923	Cusk, fresh or chilled

## Groundfish Filets

Country Commodity	Canada Groundfish, Fillets (MT)					
	2002 USDA Official (OLD)	Revised Post Est. [New] 01/2002	2003 USDA Official (OLD)	Estimate Post Est. [New] 01/2003	2004 USDA Official (OLD)	Forecast Post Est. [New] 01/2004
<b>Market Year Begin</b>						
Beginning Stocks	0	0	0	0	0	0
Total Production	19000	20000	0	18000	0	18000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	12000	12101	0	14500	0	16000
TOTAL Imports	12000	12101	0	14500	0	16000
TOTAL SUPPLY	31000	32101	0	32500	0	34000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	13000	15521	0	13500	0	12500
TOTAL Exports	13000	15521	0	13500	0	12500
Domestic Consumption	18000	16580	0	19000	0	21500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	18000	16580	0	19000	0	21500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	31000	32101	0	32500	0	34000

## Canadian Groundfish Fillet Imports

## Canadian Groundfish Fillet Imports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	10,431	12,603	12,101	6,559	8,029	22%
China	4,234	6,255	7,284	3,650	6,183	69%
United States	3,708	4,209	2,683	1,673	883	-47%
United Kingdom	685	578	852	334	166	-50%
New Zealand	738	482	312	252	159	-37%
Korea, South	24	128	252	111	192	72%
Norway	150	390	234	227	141	-38%
Russia	276	76	123	28	97	245%
Faroe Islands	276	180	121	68	97	43%
Iceland	58	42	91	83	39	-52%
All Others	-	-	-	-	-	

HS Codes	Groundfish Fillet Imports
0304200040	Haddock fillets, frozen
0304200030	Cod fillets, frozen
0304200069	Pollock fillets, nes, frozen
0304200061	Alaska pollock fillets (Theragra Chalcogramma), fr
0304100011	Cod fillets, fresh or chilled
0304100012	Haddock fillets, fresh or chilled

Source: Derived from World Trade Atlas

## Groundfish Filet Exports

## Canadian Groundfish Filet Exports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% change
-- The World --	16,508	14,817	15,521	8,223	7,436	-10%
United States	15,867	14,050	12,499	6,658	6,782	2%
China	-	5	1,036	383	256	-33%
Japan	59	-	583	287	-	-100%
Korea, South	-	-	381	242	175	-28%
United Kingdom	78	175	288	195	17	-91%
Switzerland	33	328	285	139	95	-31%
France	15	109	252	175	16	-91%
Portugal	40	71	101	101	-	-100%
Barbados	-	2	60	32	24	-25%
All Others	-	-	-	-	-	

HS Codes	Groundfish Filet Exports
03042051	Cod, Atlantic, fillets, frozen, 4.5 kgm and under
03042015	Cod fillets, frozen, in blocks over 4.5 kgm
03042061	Perch, ocean, fillets, frozen, 4.5 kgm and under
03041021	Cod Atlantic, fillets, fresh or chilled
03042016	Perch, ocean, fillets, frozen, in blocks over 4.5
03041071	Haddock fillets, fresh or chilled
03042059	Cod, nes, fillets, frozen, 4.5 kgm and under
03041029	Cod nes, fillets, fresh or chilled
03042072	Cusk and hake, fillets, frozen, 4.5 kgm and under
03042018	Pollock fillets, frozen, in blocks over 4.5 kgm
03042017	Haddock fillets, frozen, in blocks over 4.5 kgm
03042073	Pollock, fillets, frozen, 4.5 kgm and under

Source: Derived from World Trade Atlas

## Flatfish

Country Commodity	Canada Flatfish, Whole/Eviscerated (MT)					
	2002 USDA Official (OLD)	Revised Post Est. [New] 01/2002	2003 USDA Official (OLD)	Estimate Post Est. [New] 01/2003	2004 USDA Official (OLD)	Forecast Post Est. [New] 01/2004
<b>Market Year Begin</b>						
Beginning Stocks	0	0	0	0	0	0
Total Production	16500	20500	0	18000	0	17000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	12000	13805	0	13000	0	13500
TOTAL Imports	12000	13805	0	13000	0	13500
TOTAL SUPPLY	28500	34305	0	31000	0	30500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	16000	22571	0	19000	0	18000
TOTAL Exports	16000	22571	0	19000	0	18000
Domestic Consumption	12500	11734	0	12000	0	12500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	12500	11734	0	12000	0	12500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	28500	34305	0	31000	0	30500

## Canadian Flatfish Imports

## Canadian Flatfish Imports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003 % chng	
-- The World --	10,171	11,036	13,805	8,117	7,803	-4%
United States	7,439	9,172	11,250	6,889	6,711	-3%
Russia	624	319	1,196	325	360	11%
Spain	0	0	329	256	-	-100%
China	152	232	232	106	199	88%
Norway	23	1	203	153	61	-60%
Taiwan	15	8	66	5	117	2307%
All Others	2	1	1	0	0	-7%

## HS Codes

Group 5	Flatfish
030221	HALIBUT/GREENLAND TURBOT EX FILLET, LVR, ROE FR/CH
030331	HALIBUT/GREENLAND TURBOT EX FILLET/LIVER/ROE FROZN
030339	FLAT FISH NESOI EXCEPT FILLETS, LIVERS, ROES, FRZ
030229	FLATFISH NESOI EXCEPT FILLET, LIVER ROE FRESH/CHLD
030333	SOLE, EXCEPT FILLETS, LIVERS AND ROES, FROZEN
030223	SOLE EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED
030222	PLAICE EXCEPT FILLETS, LIVERS, ROES, FRESH/CHILLED
030332	PLAICE EXCEPT FILLETS, LIVERS AND ROES, FROZEN

Source: Derived from World Trade Atlas

## Canadian Flatfish Exports

## Canadian Flatfish Exports

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	15,620	17,151	22,571	11,245	10,413	-7%
United States	11,272	12,270	17,914	9,228	7,943	-14%
China	131	550	1,718	749	807	8%
Taiwan	1,914	1,727	1,323	372	449	21%
Japan	1,128	1,508	1,040	642	590	-8%
Hong Kong	168	46	225	54	215	300%
United Kingdom	199	183	162	69	163	137%
All Others	1	1	0	0	0	87%

## HS Codes

Group 35	Flatfish
03022120	Pacific halibut, fresh or chilled, excl heading 03
03022110	Atlantic halibut, fresh or chilled, excl heading 0
03033130	Greenland halibut, frozen, excluding heading No 03
03033120	Pacific halibut, frozen, excluding heading No 03.0
03022910	Flounder, fresh or chilled excluding heading 03.04
030339	FLAT FISH NESOI EXCEPT FILLETS, LIVERS, ROES, FRZ
03022300	Sole, fresh or chilled, excluding heading 03.04, I
03022130	Greenland halibut, fresh or chilled, excl heading
03022990	Flatfish nes, fresh or chilled excluding heading 0
03033110	Atlantic halibut, frozen, excluding heading No 03.
03022200	Plaice, fresh or chilled, excl heading 03.04, live

Source: Derived from World Trade Atlas

## Urchin, Roe, Caviar, Liver

Country Commodity	Canada Fish,Urchin Roe/Caviar,Livers (MT)					
	2002 USDA Official (OLD)	Revised Post Est. [New] 01/2002	2003 USDA Official (OLD)	Estimate Post Est. [New] 01/2003	2004 USDA Official (OLD)	Forecast Post Est. [New] 01/2004
<b>Market Year Begin</b>						
Beginning Stocks	0	0	0	0	0	0
Total Production	9000	9000	0	11500	0	12000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	2000	2302	0	2000	0	1800
TOTAL Imports	2000	2302	0	2000	0	1800
TOTAL SUPPLY	11000	11302	0	13500	0	13800
Intra-EC Exports	0	0	0	0	0	0
Other Exports	9650	9374	0	11000	0	11500
TOTAL Exports	9650	9374	0	11000	0	11500
Domestic Consumption	1350	1928	0	2500	0	2300
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	1350	1928	0	2500	0	2300
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	11000	11302	0	13500	0	13800



## Urchin, Roe, Caviar, Liver Imports

**Canadian Roe, Caviar, Liver, Imports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	1,418	2,273	2,302	1,898	809	-57%
United States	1,314	2,195	2,136	1,806	746	-59%
New Zealand	0	4	46	30	17	-46%
Norway	0	0	33	7	10	51%
China	0	0	29	26	-	-100%
Japan	46	56	29	18	14	-24%
Russia	12	3	3	2	1	-73%
All Others	0	0	0	0	0	161%

## HS Codes

Group 38	Roe, Caviar, Liver Imports
030250	COD EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED
160430	CAVIAR AND CAVIAR SUBSTITUTES
030270	FISH LIVERS AND ROES, FRESH OR CHILLED

Source of Data: Statistics Canada

## Urchin, Roe, Caviar, Liver Exports

**Canadian Roe, Caviar, Liver, Exports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002		Jan-July 2002	Jan-July 2003	% chng
-- The World --	10,580	9,831	9,374	#	5,060	6,157	22%
Japan	8,051	8,126	7,984	#	4,362	4,474	3%
China	513	382	419	#	418	577	38%
United States	211	203	322	#	158	551	249%
United Kingdom	171	293	322	#	40	30	-26%
Sweden	117	146	123	#	28	77	176%
Thailand	-	10	35	#	35	198	462%
Finland	42	49	26	#	4	27	597%
All Others	1,474	621	143	#	15	223	1377%

## HS Codes

Group 34	Roe, Caviar, Liver
03052020	Herring roe, dried, smoked, salted or in brine
03038020	Herring roe, frozen
160430	CAVIAR AND CAVIAR SUBSTITUTES
030270	FISH LIVERS AND ROES, FRESH OR CHILLED
03038030	Salmon roe, frozen
03052030	Salmon roe, dried, smoked, salted or in brine
03038090	Fish livers and roes, nes, frozen
03052090	Fish livers and roes, nes, dried, smoked, salted

Source of Data: Statistics Canada; World Trade Atlas

## Salmon

Country Commodity	Canada Salmon, Whole/Eviscerated (MT)					
	2002 USDA Official (OLD)	Revised Post Est. [New] 01/2002	2003 USDA Official (OLD)	Estimate Post Est. [New] 01/2003	2004 USDA Official (OLD)	Forecast Post Est. [New] 01/2004
<b>Market Year Begin</b>						
Beginning Stocks	0	0	0	0	0	0
Total Production	60000	70000	0	68000	0	72000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	25000	14214	0	12000	0	13500
TOTAL Imports	25000	14214	0	12000	0	13500
TOTAL SUPPLY	85000	84214	0	80000	0	85500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	65000	67692	0	60000	0	65000
TOTAL Exports	65000	67692	0	60000	0	65000
Domestic Consumption	20000	16522	0	20000	0	20500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	20000	16522	0	20000	0	20500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	85000	84214	0	80000	0	85500

## Salmon Imports

**Canada: Imports of Salmon, Whole or Eviscerated, Fresh or Frozen**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	31,334	22,552	14,214	8,842	7,787	-12%
United States	29,278	20,443	12,656	7,788	6,879	-12%
Chile	914	1,002	678	464	388	-16%
Philippines	32	185	226	144	83	-42%
Cuba	61	54	94	85	-	-100%
Sri Lanka	-	90	78	62	13	-79%
Mexico	78	90	63	47	-	-100%
United Kingdom	99	32	5	4	79	1696%
Ireland	12	-	6	-	39	na
All Others	860	656	408	249	305	na

HS Codes	Salmon, Whole or Evisc.
030212	SALMON, PAC, ATL & DANUBE, WITH BONES, FR OR CHILL
030319	PACIFIC SALMON, NESOI, EXCL FILET, LIVER, ROE, FROZEN
030219	SALMONIDAE, NESOI, FRESH OR CHILLED
030311	SOCKEYE SALMON, EXCL FILLET, LIVERS & ROES, FROZEN
030329	SALMONIDAE NESOI, WITH BONES, FROZEN
030322	ATLANTIC AND DANUBE SALMON, WITH BONES, FROZEN

Source: Derived from World Trade Atlas

## Salmon Exports

**Salmon, Whole or Eviscerated, Exports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	54,857	63,222	67,692	41,538	35,867	-14%
United States	48,325	56,025	63,984	40,260	33,273	-17%
Japan	3,196	3,699	2,098	671	840	25%
Taiwan	952	1,772	514	334	941	182%
Lithuania	-	52	260	34	466	1267%
China	440	400	243	98	76	-23%
Hong Kong	167	188	79	66	109	66%
All Others	1,778	1,085	515	77	162	112%

HS codes	Salmon, Whole or Eviscerated
030212	SALMON, PAC, ATL & DANUBE, WITH BONES, FR OR CHILL
030322	ATLANTIC AND DANUBE SALMON, WITH BONES, FROZEN
030329	SALMONIDAE NESOI, WITH BONES, FROZEN
030219	SALMONIDAE, NESOI, FRESH OR CHILLED

Source: Derived from World Trade Atlas

## Canned Salmon

Country Commodity	Canada Salmon, Canned					
	(MT)					
	2002	Revised	2003	Estimate	2004	Forecast
	USDA	Post	USDA	Post	USDA	Post
Market Year Begin	Official [Old]	Estimate [New]	Official [Old]	Estimate [New]	Official [Old]	Estimate [New]
		01/2002		01/2003		01/2004
Beginning Stocks	0	0	0	0	0	0
Total Production	22000	22000	0	23000	0	24000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	11000	12718	0	13000	0	14000
TOTAL Imports	11000	12718	0	13000	0	14000
TOTAL SUPPLY	33000	34718	0	36000	0	38000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	9000	7992	0	8200	0	9000
TOTAL Exports	9000	7992	0	8200	0	9000
Domestic Consumption	24000	26726	0	27800	0	29000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	24000	26726	0	27800	0	29000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	33000	34718	0	36000	0	38000

## Canned Salmon Imports

**Canned Salmon Imports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

HS Code: 1604.11

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	12,429	16,864	12,718	6,125	6,256	2%
United States	11,548	15,208	11,440	5,134	5,882	15%
Thailand	240	284	518	438	113	-74%
China	12	199	255	179	28	-84%
Chile	11	611	166	142	46	-67%
Korea, South	598	473	140	86	101	17%
Malaysia	-	-	120	108	-	-100%
Denmark	2	52	55	22	63	189%
Norway	-	0	8	5	17	236%
All Others	18	36	17	12	7	-42%

Source of Data: World Trade Atlas

## Canned Salmon Exports

**Canned Salmon Exports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

HS Code: 1604.11

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	9,377	9,956	7,992	3,944	4,109	4%
United Kingdom	4,434	4,454	3,195	1,474	1,647	12%
Australia	1,098	1,455	1,573	666	533	-20%
New Zealand	1,141	1,060	994	585	526	-10%
Belgium	540	883	849	627	627	0%
United States	1,377	1,227	299	82	246	201%
Ireland	155	158	272	150	203	36%
All Others	632	719	810	360	327	-9%

Source: Derived from World Trade Atlas

## Lobster

Country Commodity	Canada Lobster					
	(MT)					
	2002 USDA	Revised Post	2003 USDA	Estimate Post	2004 USDA	Forecast Post
Market Year Begin	Official (OLD)	Est. [New] 01/2002	Official (OLD)	Est. [New] 01/2003	Official (OLD)	Est. [New] 01/2004
Beginning Stocks	0	0	0	0	0	0
Total Production	40000	38000	0	42000	0	45000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	16000	22291	0	15000	0	17000
TOTAL Imports	16000	22291	0	15000	0	17000
TOTAL SUPPLY	56000	60291	0	57000	0	62000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	41000	42542	0	38000	0	40000
TOTAL Exports	41000	42542	0	38000	0	40000
Domestic Consumption	15000	17749	0	19000	0	22000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	15000	17749	0	19000	0	22000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	56000	60291	0	57000	0	62000



## Lobster Imports

**Canadian Lobster Imports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	18,073	16,927	22,291	3,815	833	-78%
United States	17,133	16,217	21,268	3,273	325	-90%
Cuba	330	303	499	301	150	-50%
Bahamas	247	182	180	95	93	-2%
Haiti	12	68	102	52	70	35%
India	119	29	44	25	5	-79%
United Arab Emirates	8	7	40	14	29	110%
China	3	5	25	3	10	216%
All Others	222	115	133	52	150	188%

HS Codes	Lobster
030622	LOBSTERS, LIVE, FRESH,CH, DRIED, SALTD OR IN BRINE
030611	ROCK LOBSTER AND OTHER SEA CRAWFISH, FROZEN
030612	LOBSTERS, INCLUDING IN SHELL, FROZEN
030621	ROCK LOBSTER, OTHER SEA CRAWFISH LV/CH/DRD/SALTED

Source of Data: World Trade Atlas

## Lobster Exports

**Canadian Lobster Exports**

2000-2002 Calendar Years and Year to Date Comparisons

Units: metric tons

	2000	2001	2002	Jan-July 2002	Jan-July 2003	% chng
-- The World --	38,031	40,519	42,542	26,176	24,244	-7%
United States	28,292	30,129	32,269	19,788	18,704	-5%
Belgium	2,423	1,863	2,147	1,435	815	-43%
France	1,719	1,966	1,710	1,242	1,101	-11%
Japan	1,444	1,472	1,690	1,190	863	-28%
Korea, South	289	472	950	367	588	60%
United Kingdom	1,023	1,032	908	529	504	-5%
Germany	451	642	586	388	256	-34%
Italy	552	791	453	368	337	-8%
All Others	2	2	2	1	1	24%

HS Codes	Lobster
030622	LOBSTERS, LIVE, FRESH, CH, DRIED, SALTD OR IN BRINE
030612	LOBSTERS, INCLUDING IN SHELL, FROZEN
030621	ROCK LOBSTER, OTHER SEA CRAWFISH LV/CH/DRD/SALTED
030611	ROCK LOBSTER AND OTHER SEA CRAWFISH, FROZEN

Source: Derived from World Trade Atlas